## Will preparation and digital estate planning

Helping you and your family prepare for the future by ensuring your final wishes are clear



76% of Americans acknowledge having a will is important, but only 30% have one in place<sup>1</sup>

# Helping you and your family navigate life's twists and turns

As part of your life insurance plan, you have access to will preparation services, available to you at no additional cost. This service can help ease the stress if you ever become unable to make decisions for yourself. With legal guidance and unlimited consultations with a vast network of attorneys, you can feel confident you're making the right decisions for you and your family.

## Easing the complexity of the process for you

Our legal experts guide you through what can feel like an overwhelming process, each step of the way.

- 1. Outline assets and final wishes
- 2. Consider digital assets, if any
- **3.** Gather documents needed
- 4. Choose executor and beneficiaries
- 5. Nominate guardians
- 6. Sign and store will
- 7. Update or amend will as needed

## Covered services include:

- Preparation and updates of wills for you and your spouse/domestic partner, including:
  - complex wills and codicils
  - ▶ living wills
  - powers of attorney for medical directives
  - healthcare proxies
- In-person or telephone consultations in a private, supportive environment with an attorney from our extensive network of 18,000+ participating plan attorneys in the U.S.
- **Unlimited access to services** as soon as life insurance coverage begins and for as long as you continue to participate in an eligible MetLife group life plan.

<sup>1</sup>MetLife's 2020 Premature Death Study



## Providing a seamless experience from start to finish

Expert guidance is just a phone call or click away. There are three simple ways you can locate and access an attorney.

#### 1. Call our Customer Service team

- **1. Call +1 216-535-4395** or **1-800-821-6400** (in the U.S.), 8:00 AM 8:00 PM EST, Monday-Friday.
- Choose option 1: Estate Planning
   Use this option to access estate resolution and will preparation services.
- You'll be connected to a representative for further assistance. You'll be asked for:
  - Company name: MetLife Worldwide Benefits
  - ► Customer number: 8009876
  - Last four digits of your Social Security number or Employee ID number. This is for tracking purposes only, so you can give either. If you do not have a SSN, you can provide your international tax ID or employee ID number.

#### 2. Visit the MetLife Legal Plans website



#### Go to legalplans.com/estateresolution.

To register and create an account, you'll need to enter your full legal name, address, phone number, email address and preferred login password.

If you do not have a U.S. address, please use the following: 600 North King Street, Wilmington, DE 19801 Once you're logged in, **click on the attestation to continue.** This will take you to the homepage.

Click on a service and complete the form. You can choose from Last Will and Testament, Power of Attorney, Advance Healthcare Directive or Miscellaneous Wills and Estates.



If you select Estate Planning or Last Will and Testament, you'll be prompted to answer three simple questions. You'll have the option to leverage our online services or search for an attorney in the U.S. to set up an appointment to draft documents in person.

If you choose the in-person option when requesting Power of Attorney, Advance Healthcare Directive, Probate or Miscellaneous Wills and Estate Services, you'll be prompted to search for an attorney in your area if you're in the U.S.

You can select an attorney through a drop-down listing of all in-network attorneys in your area and make an in-person or phone appointment.

### 3. Fee reimbursement

- 1. If you choose not to leverage the options above, fee reimbursement allows you to find your own attorney and submit a claim for a set amount of the cost.
- 2. To submit a claim, call our Customer Service team using the number outlined above.

Customer Service can also tell you the exact reimbursement amounts.

- 3. After the claims process is started, you'll receive a fee reimbursement packet to fill out.
- 4. Follow the instructions on the packet. This will be used to gather the necessary information to generate a payment to you.

Will Preparation is offered by MetLife Legal Plans, Inc., Cleveland, Ohio. In certain states, legal services benefits are provided through insurance coverage underwritten
by Metropolitan General Insurance Company, Warwick, Rhode Island. Tax Planning and preparation of Living Trusts are not covered by the Will Preparation Service.
MetLifeWorldwide.com
MetLife's worldwide benefits products are underwritten by Delaware American Life Insurance Company, a MetLife affiliate domiciled at 600 North King Street, Wilmington, DE 19801, and other affiliates.
Like most group insurance policies, insurance policies offered by MetLife contain certain exclusions, exceptions, waiting periods, reductions, limitations and terms for keeping them in force. Ask your MetLife representative for costs and complete details.
MetLife  Delaware American Life Insurance Company   600 North King Street   Wilmington, DE 19801  © 2022 MetLife Services and Solutions, LLC.